

Getting Started with Oracle Application Server Portal

Welcome to OracleAS Portal!



No matter what you want to do—browse content, add content, or create a portal—Oracle Application Server Portal (OracleAS Portal) provides an environment with just the tools you need, and without the distraction of the tools you don't need. Depending on what you want to do, you can learn much of what you need to know simply by reading a few concepts and working through the accompanying hands-on exercises.

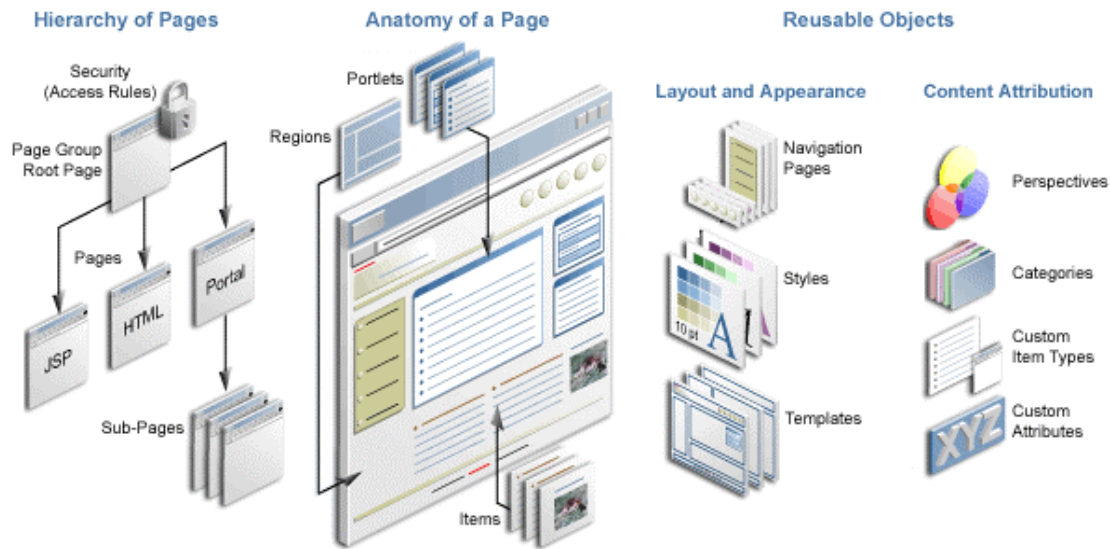
What do you want to do?

- Learn the Basics
- Find Content and Rearrange My View of the Portal
- Add Files and Images to OracleAS Portal Pages
- Create Pages Dedicated to a Particular Use
- Build Components on Top of Various Data Sources
- Administer a Set of Pages Dedicated to a Particular Use
- Administer OracleAS Portal
- Follow Hands-On Exercises To Learn How To Use Portal

If you're new to Portal, be sure to visit the Learn the Basics section. It will introduce you to terms and concepts essential to using OracleAS Portal.

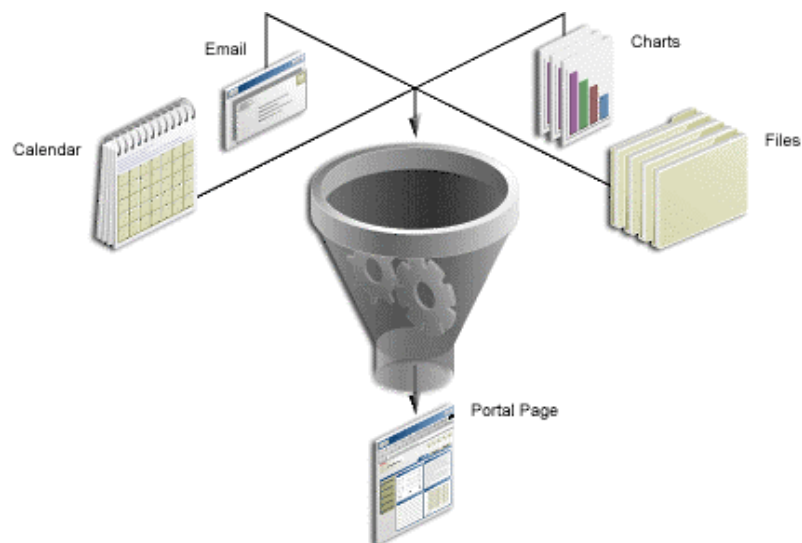
Learning the Basics

What Is a Portal?

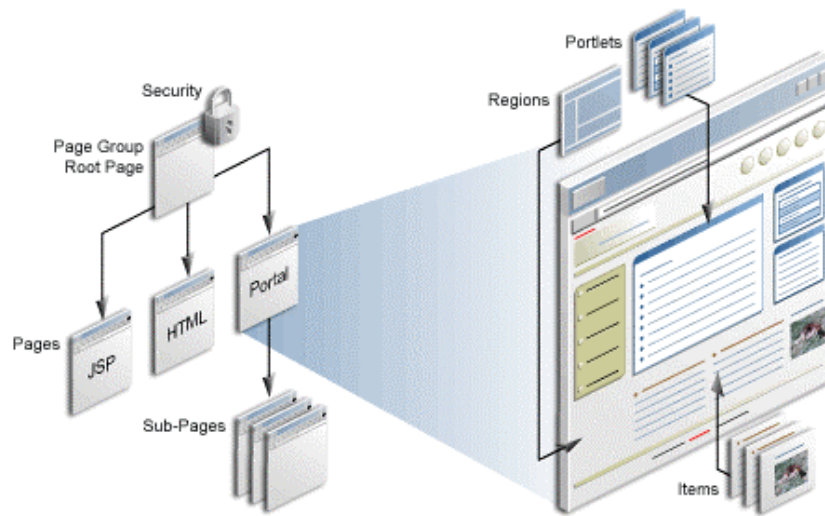


Oracle Application Server Portal is a component of Oracle Application Server that is used for the development, deployment, administration, and configuration of enterprise-class portals. OracleAS Portal incorporates a portal-building framework with self-service publishing features that enable you to create, publish, and manage information within your portal.

Use your portal to publish information from your database and other sources, to provide and gather information from internal and external customers, and to manage the content they will consume.

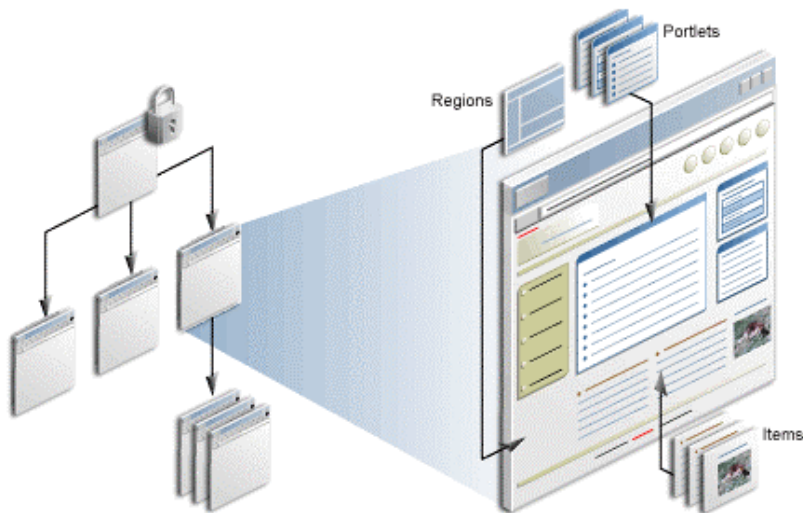


A portal is made up of groups of pages hosting many different types of content that come from many different sources, all presented from a single location: the portal.



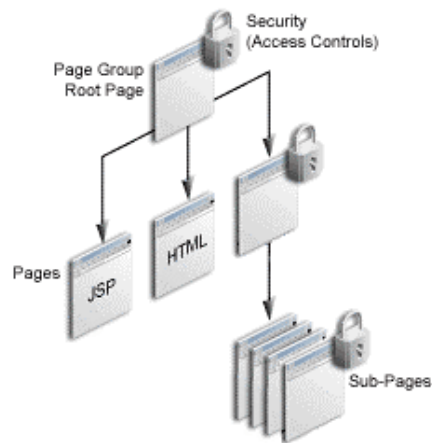
The basic structural components of a portal built with OracleAS Portal include page groups, pages, tabs, regions, portlets, and items.

Pages



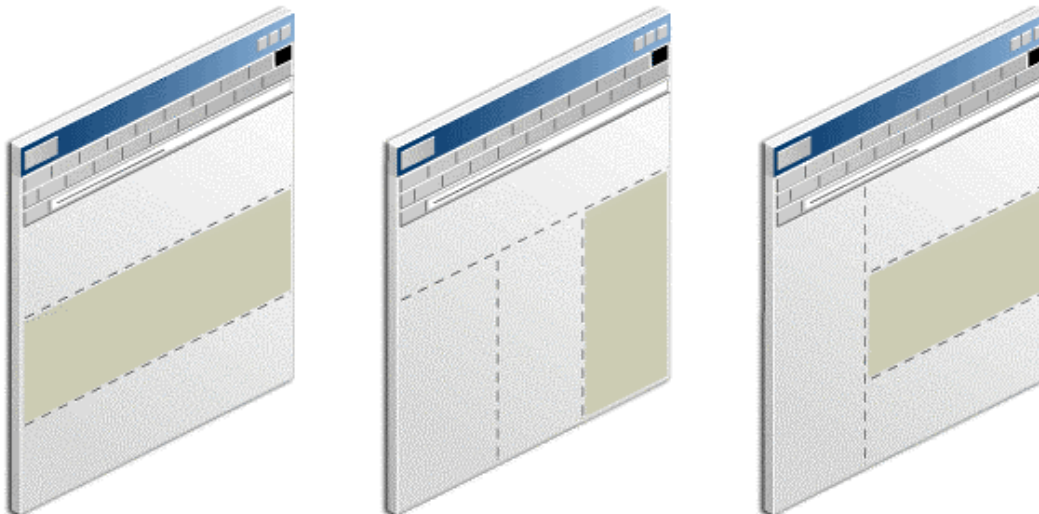
Use pages to publish and display your content. OracleAS Portal pages combine the features of a directory folder and a Web page. Like a folder, a page exists within a hierarchy and can contain content. Like a Web page, it is accessible via a URL and has a user interface (i.e., the browser) that permits page designers to control how the information displays on the page.

Page Groups



Page groups are, literally, groups of pages. Each group of pages can be uniquely dedicated to a different purpose or organization within or external to your company. For example, one group of pages may serve your Human Resources department; another may serve the sales force. Conversely, one page group can serve different organizations. For example, your organization can have a master page group, with individual pages in the group dedicated to a specific purpose or internal organization.

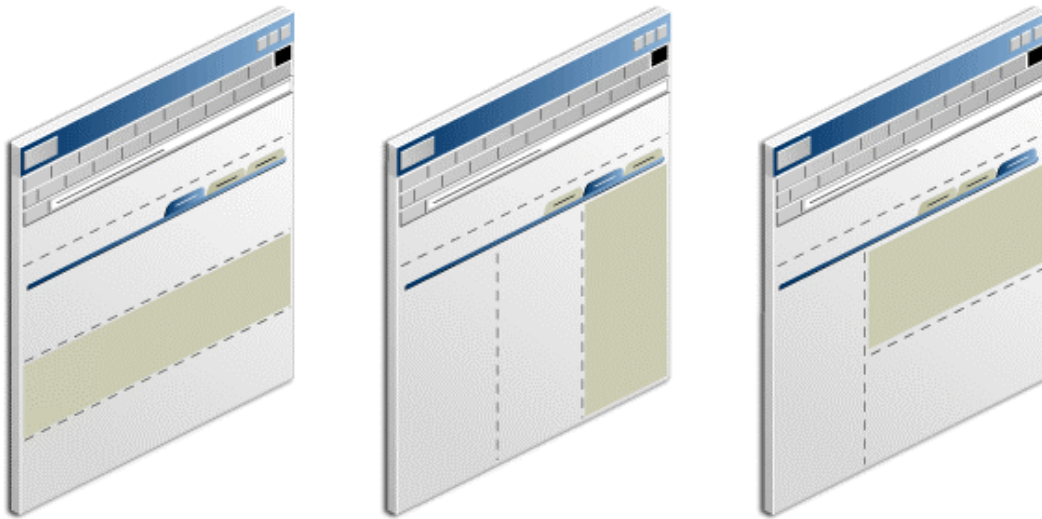
Regions



In OracleAS Portal, pages are divided into discrete areas called *regions*. Regions define the layout of a page and contain your portal content. You can visualize regions as rectangles that divide up the surface area of a page. In these rectangles, you place the

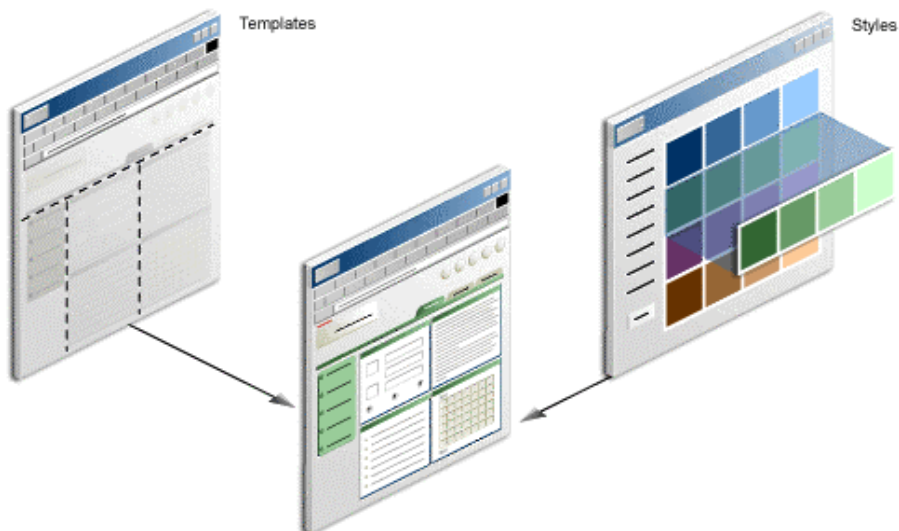
images, links, text, files, portlets, and other content you wish to appear on your portal page.

Tabs



Add tabs to a region to produce a virtual stack of regions. You can subdivide regions into multiple regions on both pages and tabs to create a page layout.

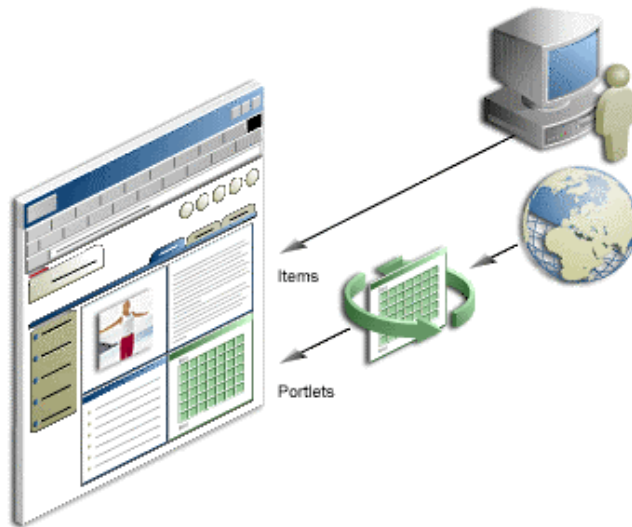
Templates and Styles



OracleAS Portal also provides you with the tools you need to create a custom look-and-feel for your pages. It supports the creation and distribution of page templates to help with the enforcement of a standard look. It provides pre-built templates that you can customize or use straight out of the box.

Additionally, you'll find many design tools for the creation and application of styles. Use styles to control the colors, fonts, and backgrounds of pages and their content. Apply styles to whole pages or to one or more regions on a page.

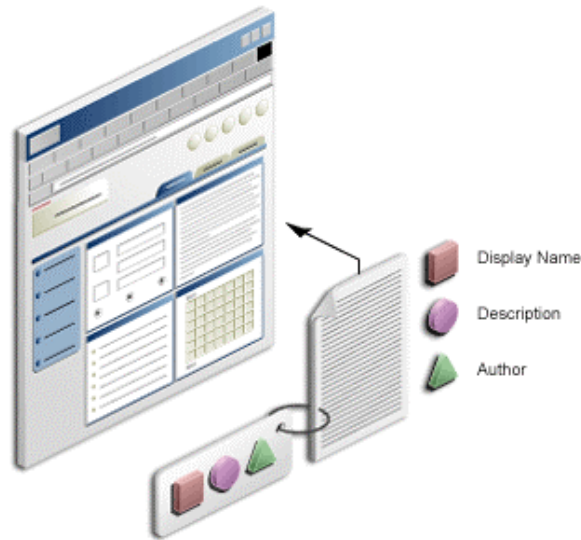
Items and Portlets



The content you place on your pages can be divided into two types: items and portlets:

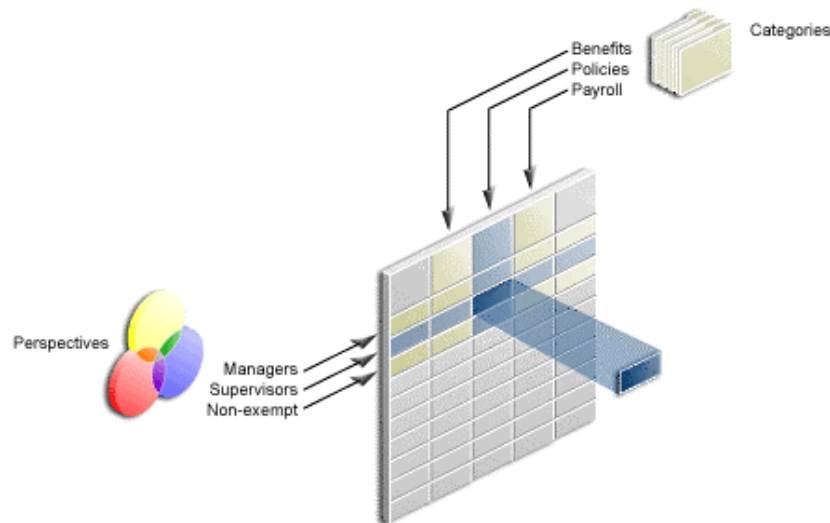
- Items include links; PL/SQL components; different types of files, such as image, HTML, word processing, Zip, and so on; and other types of objects. Examples of items include a link to another page, an image of your company logo, or some static display text.
- Portlets are reusable information components that summarize or provide access to different types of information sources. Examples of portlets include a dynamically updated report of quarterly earnings, a search field and button, or a simple user poll.

Item and Portlet Attributes



When you load content into your portal, you can also enter useful information about that content. You can enter such things as the name of the author, the content expiration date, or any variety of other useful bits of information. These bits of information are called *attributes*. Each item type in OracleAS Portal comes with a set of default attributes. You can add your own attributes to the set to create custom item types.

Categories and Perspectives



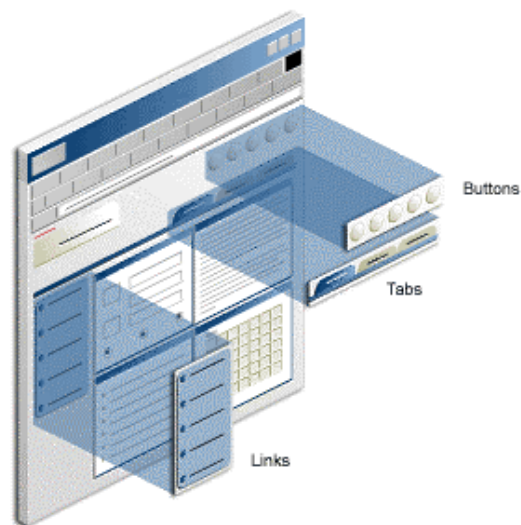
Two commonly used attributes are *categories* and *perspectives*. Categories and perspectives assist you with classifying the content you add to your portal. For example, when you upload a file, you can assign one category to it that describes the type of information the file contains, such as *Benefits*. You can assign many perspectives that

describe the different audiences that may be interested in the file content, such as *Directors, Managers, and Individual Contributors*.

This is just one possible use of categories and perspectives. The opportunities for creative application of these attributes are endless.

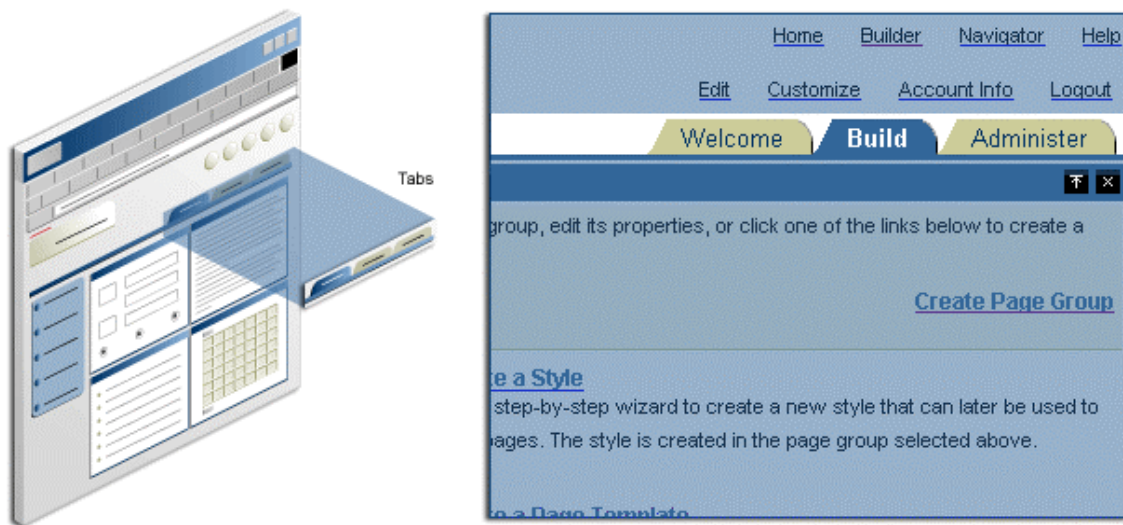
Combined with a Custom Search portlet, you can use categories and perspectives to automatically locate and publish all the information in your portal that pertains to a specific topic and/or is targeted to a particular audience.

Navigation



When you first log in to OracleAS Portal, you may notice many different navigational elements, typically, buttons, links, and tabs. Depending on your company's configuration, the upper right corner of your portal home page may contain a shortcut bar with links and buttons that will take you to advanced functional areas within Portal or to other portals. The buttons, links, and tabs you see depend on which ones your company's page designer includes as well as what privileges you have on the page.

Default Navigation Links



Depending on your access privileges, you may see any combination of these links, as well as those your company page designer has included:

- The **Edit** link is the entry point for Edit mode, where you can change page properties and styles, define user access, and add sub-pages. Edits affect everyone's view of the page.
- The **Customize** link is the starting point for rearranging portlets and adding existing portlets to a page. Customizations affect only your view of the page.
- The **Builder** link is the starting point for creating a portal.
- The **Help** link is the entry point to a rich source of information on how to use OracleAS Portal. Additionally, some pages, tabs, banners, and other objects include a question mark icon. This links to context-sensitive help topics that will assist you with features on the current page.

The OracleAS Portal Builder

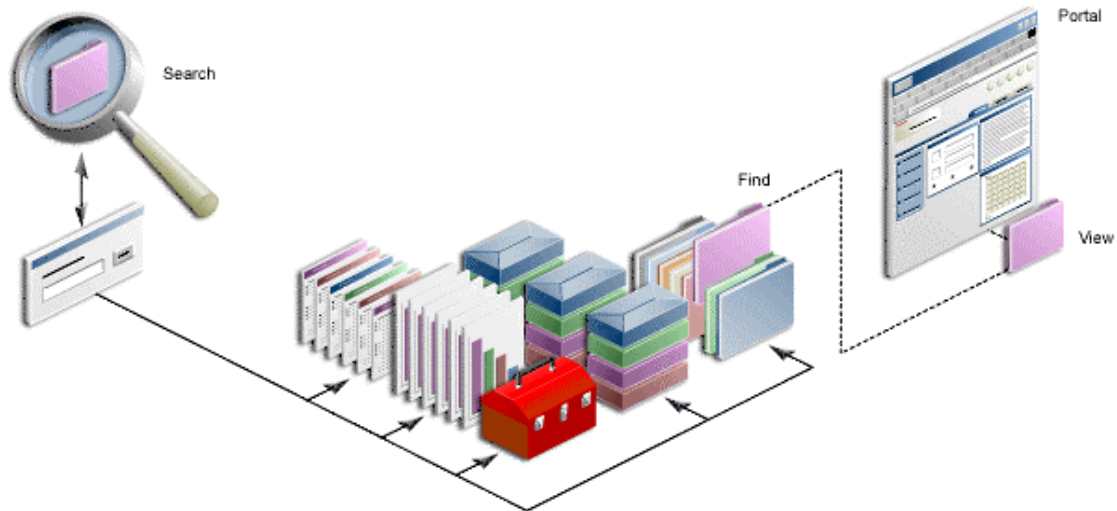


Click the **Builder** link to view the Portal Builder page. In addition to any custom tabs your portal administrator may include, your view of the Portal Builder page may also include any of these default tabs, typically visible only to those building the portal and those with privileges to see them:

- The **Welcome** tab provides quick links to useful information about OracleAS Portal. It includes a mapped image that links to brief explanations of OracleAS Portal concepts.
- The **Build** tab is a starting point for creating and editing pages and page groups or providers and provider groups. (Some of this functionality is also available when you click the **Navigator** link in the shortcut bar.)
- The **Administer** tab is a starting point for managing users and groups, administering security, and configuring OracleAS Portal services, such as Global Settings, Directory Administration, Proxy Settings, and others. By default, only portal administrators can access this tab.

Finding Content and Rearranging Your View of the Portal

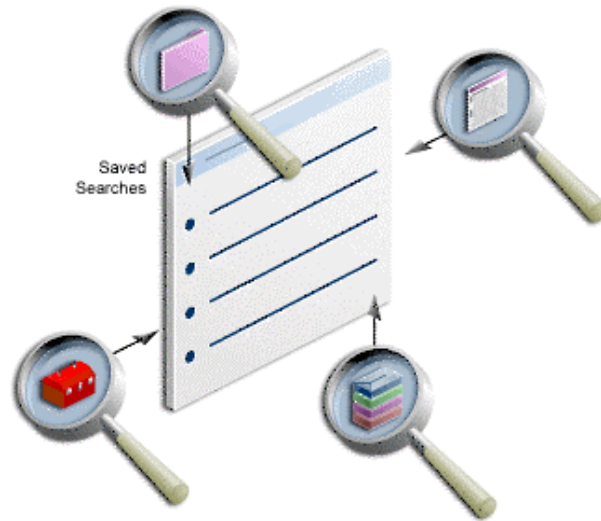
Introduction



No matter the size of the enterprise, most companies have a vast library of useful documents and applications that are essential for doing your job. It can be a challenge to locate just the document you need, to return to it once you've found where it's stored, and to keep on top of critical changes to it.

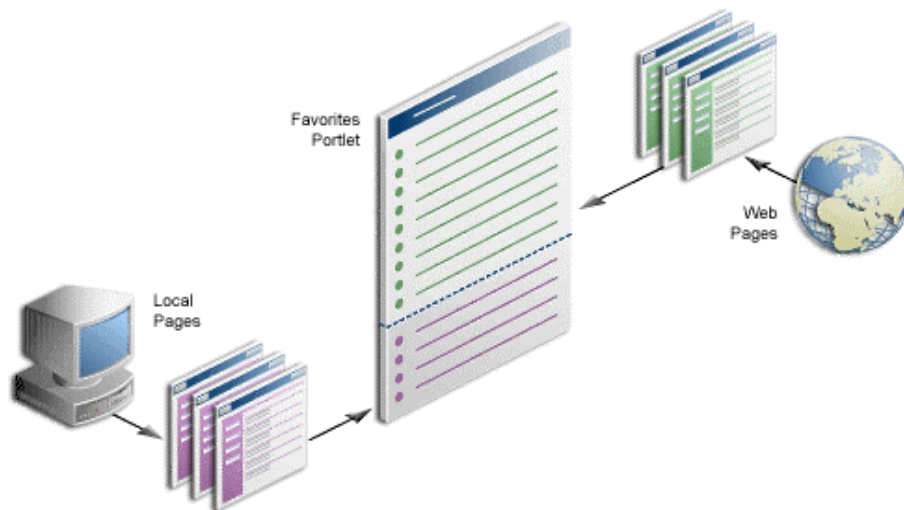
OracleAS Portal helps you with all of these challenges. For locating essential information, OracleAS Portal provides a search feature that enables you to look for information according to the ways it has been classified (via categories and perspectives), or against terms available in its content, its author, or a number of other criteria.

The Saved Searches Portlet



OracleAS Portal comes with a Saved Searches portlet you can use to save useful search strings. Your search string displays as a link in the portlet, which you can click to initiate another search based on the string. If your company's page designer did not include this portlet in your default set up, you can always add it yourself.

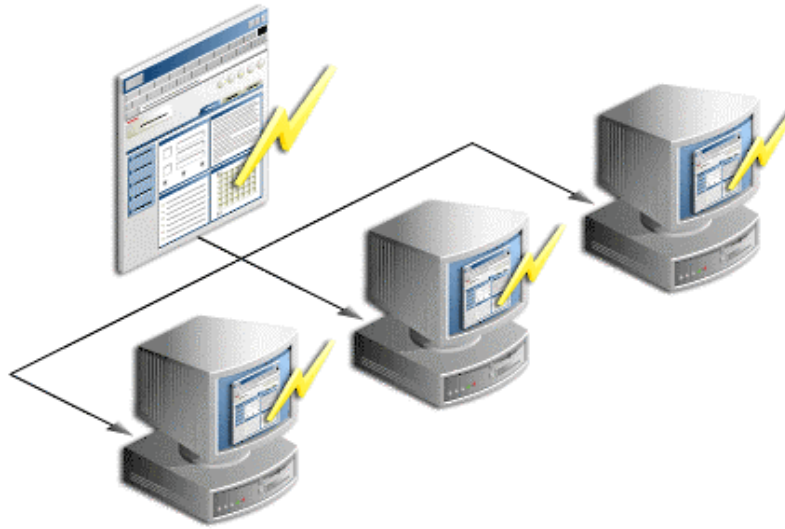
Adding Favorites



Once you find the information you're looking for, you can add a link to it in the Favorites portlet on your personal page.

[\[Viewlet\] Show me how to add a link to the Favorites portlet!](#)

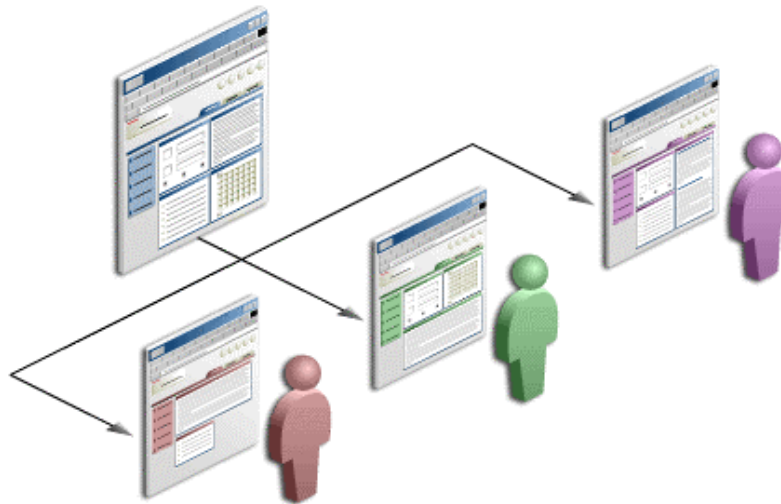
Subscribe and Notify



Additionally, OracleAS Portal provides a subscription service you can use to subscribe to pages and receive notification when those pages are updated.

[\[Viewlet\] Show me how to keep up with changes to pages that are important to me!](#)

Customizing Your View



Through the **Customize** link, OracleAS Portal gives you the power to arrange the information on your personal start page to suit your specific needs and preferences. Add your own tabs, show or hide the default portlets, or add new portlets from registered portlet providers.

[Viewlet] Show me a few simple tricks for personalizing a page!

Portal Online Help

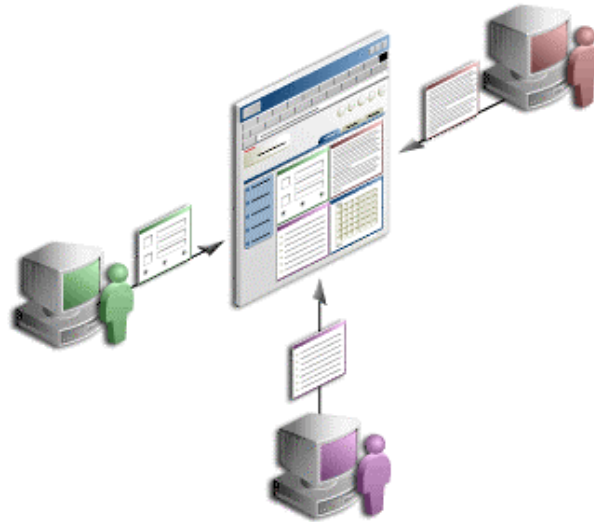


OracleAS Portal offers a comprehensive set of product documentation, including online help and user, configuration, and upgrade guides. The OracleAS Portal User's Guide describes how to build page groups, design and customize pages, and add and access content. The OracleAS Portal Configuration Guide describes how to configure your portal. The OracleAS Portal Upgrade Guide assists with moving from an earlier to a later version of OracleAS Portal. Online help explains the fields and choices available on the current portal page.

The online help is available with OracleAS Portal. All of the guides are available on Portal Center, <http://portalcenter.oracle.com>.

Adding Files and Images to OracleAS Portal Pages

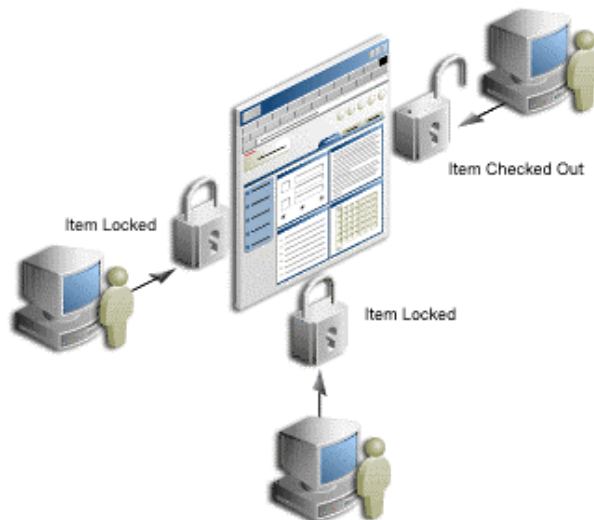
Introduction



In a business environment, bottlenecks can easily form as new content from multiple sources moves to the one or two people allowed to publish it to the Web. OracleAS Portal overcomes these bottlenecks with its highly collaborative environment.

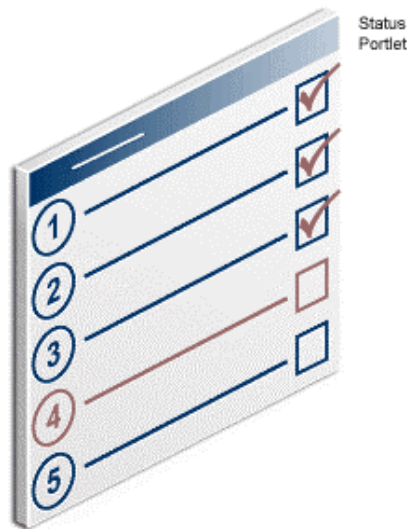
With OracleAS Portal, you can share content management tasks across your organization. Different departments within your organization can each create their own set of relevant information and share the task of adding to and editing the content within it.

Adding Content



Once your portal administrator gives you the *Manage Content* privilege, it's easy to add new content. Additionally, depending on what attributes have been assigned to content, you can choose the category under which content appears, enter a description of the content, or enable a checkout feature to ensure that only one person at a time will edit the content.

The Status Portlet

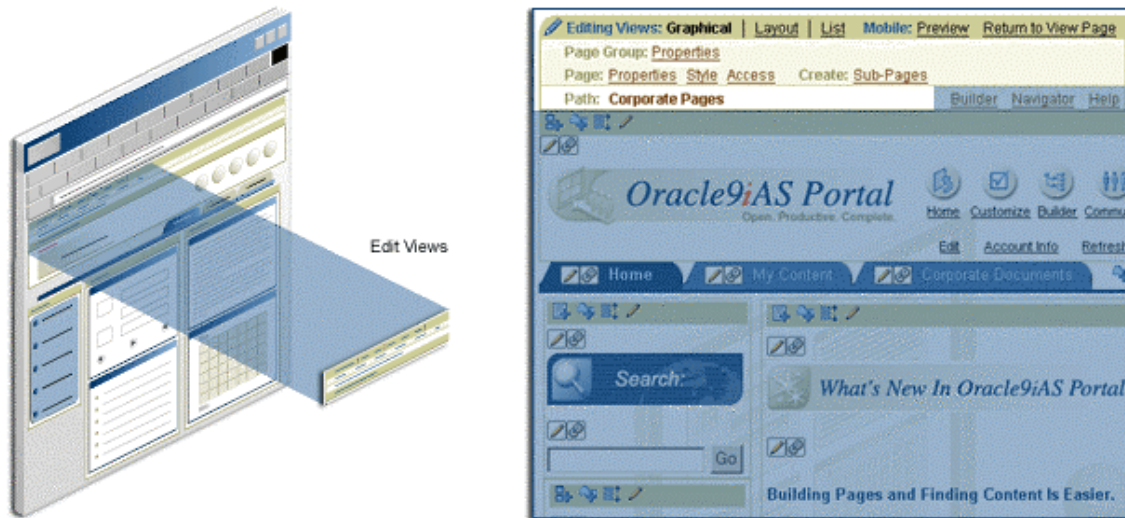


Those with the *Manage* or *Manage with Approval* privilege can use the Status portlet to see the status of content in the approval queue.

These are just a few of the features and customizations you can apply to any content you publish through OracleAS Portal!

[\[Viewlet\] Show me how to add a file!](#)

The Edit Mode Toolbar

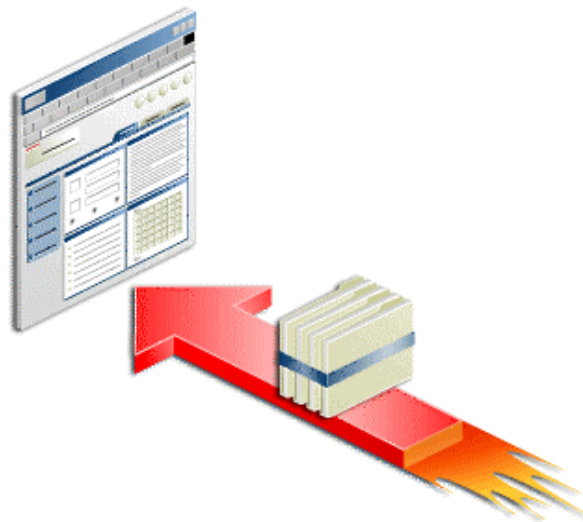


When you edit a page, a toolbar at the top of the page gives you access to different editing views. These include graphical, layout, list, and mobile. Edit mode is the starting point for adding content; editing page properties, styles, and access rules; creating sub-pages; adding and arranging portlets and tabs; and editing page regions.

The actions you perform in Edit mode affect everyone's view of the portal.

[\[Viewlet\] Show me how to use the Edit mode toolbar!](#)

Uploading Multiple Files

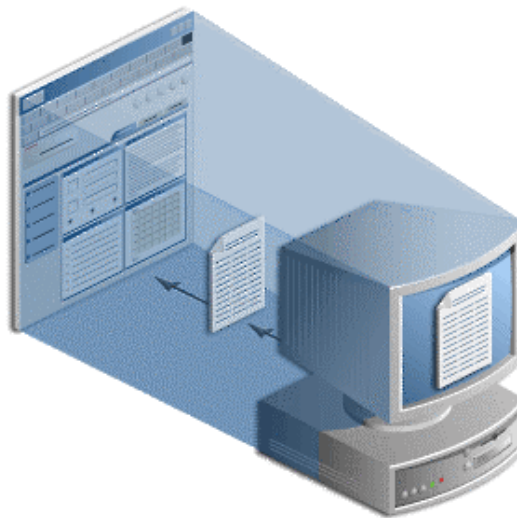


Whether you have one or many items to upload, OracleAS Portal provides the tools to make it easy. Once you have the *Manage Content* privilege, you can even upload a Zip file then unzip it in your portal.

This enables you to load many files at once, including the files' directory structures, significantly reducing the time it takes to load multiple files. It simplifies the process of loading, for example, HTML and image files intertwined with relative links, by preserving the files' locations relative to each other, and consequently preserving the links.

[\[Viewlet\] Show me how to upload multiple files simultaneously!](#)

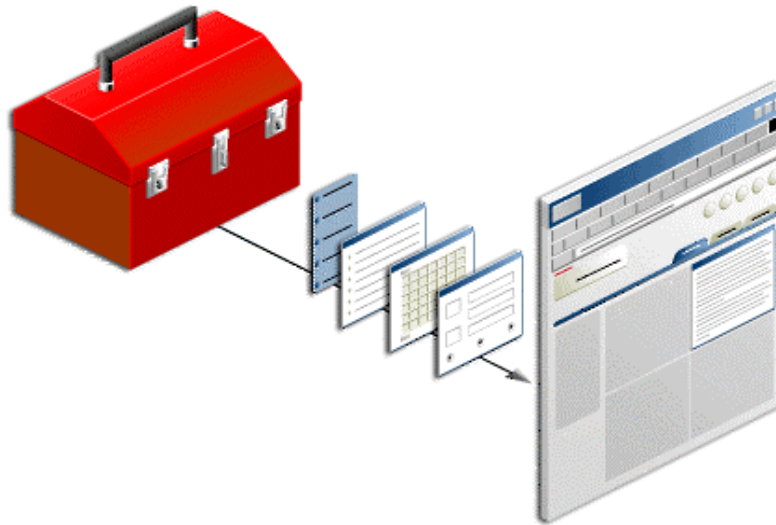
Editing Portal Content Locally



To make adding content even easier, OracleAS Portal works cooperatively with any WebDAV-enabled tool. These include Windows Explorer, Microsoft Office, and Dreamweaver, to name a few. Use WebDAV-enabled tools to edit your portal content in place (i.e., through your file system). For example, access portal content through a WebDAV folder, edit it using a WebDAV-enabled tool, then save your changes. This automatically updates the file in your portal without requiring that you upload the newly edited version.

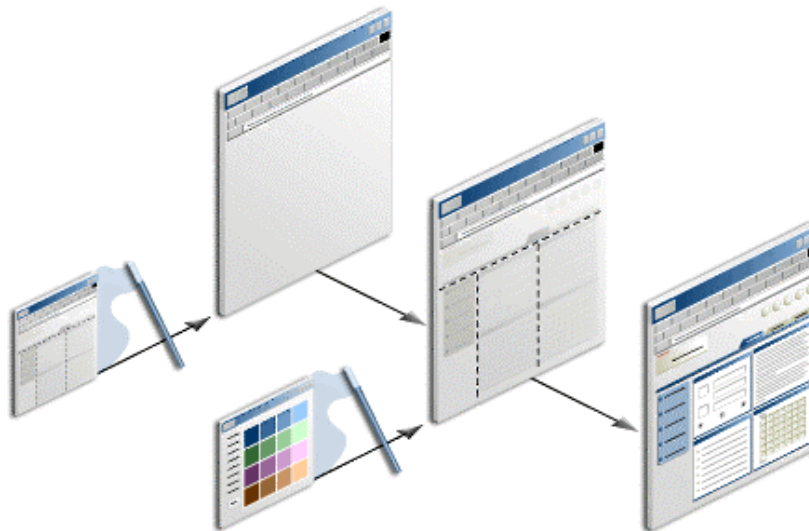
Creating Pages Dedicated to a Particular Use

Introduction



Whether you're short on time and want pre-built components to help create pages rapidly or simply want a wide range of tools and options for creating custom pages, OracleAS Portal has what you need. It includes many easy-to-use tools for creating pages, applying styles, adding images, and providing navigation to get your pages up-to-speed and out the door.

Simple Steps to Page Creation

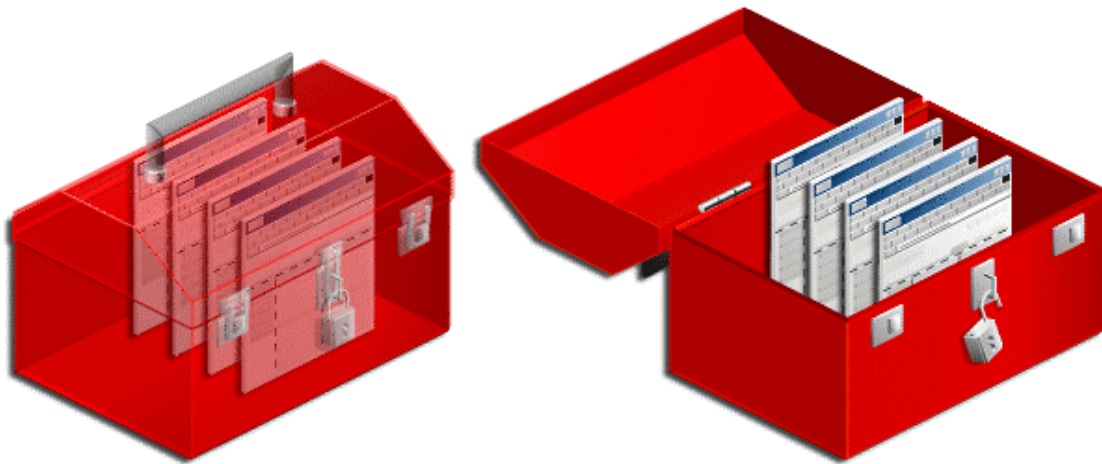


Create portal pages through the Page Creation Wizard. Simply click a link, provide internal and display names, click **Finish**, and you're done. If you want, you can also select

a template, apply a pre-packaged or a custom style, and specify page access privileges to control who may view your page.

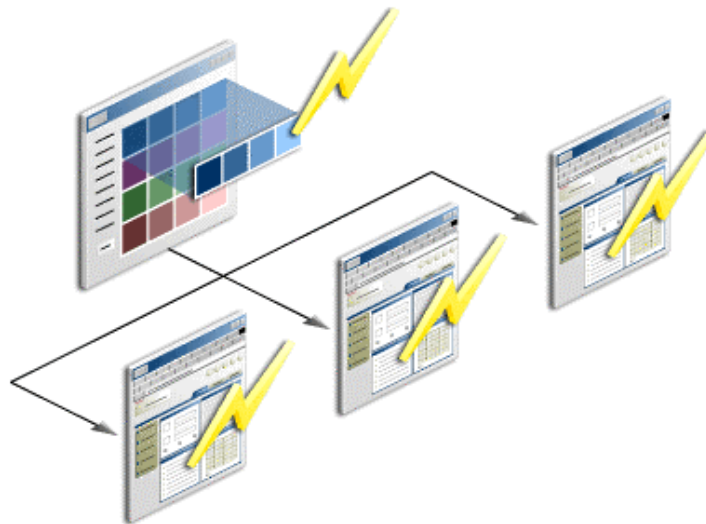
[\[Viewlet\] Show me how to create a page!](#)

Public and Private Templates



You can define your layout with an OracleAS Portal-provided template or a custom template you provide. You can keep your templates private during development, and make them available for use within a particular page group when you're ready to roll them out.

Selecting Page Styles

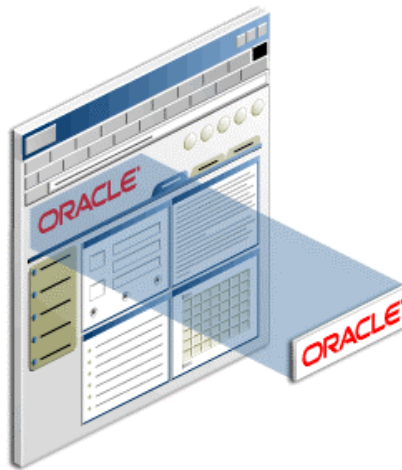


Page styles control the colors, fonts, and background images used within pages, tabs, and portlets. Use page styles to develop and apply a standard look and feel to your portal pages. Apply the same style to any number of pages to create a consistent look. Update all pages that use the style in seconds, merely by updating the style.

To set a page style, select a style from a list of available styles (the ones you own and public styles), or create a new style and apply it to a page.

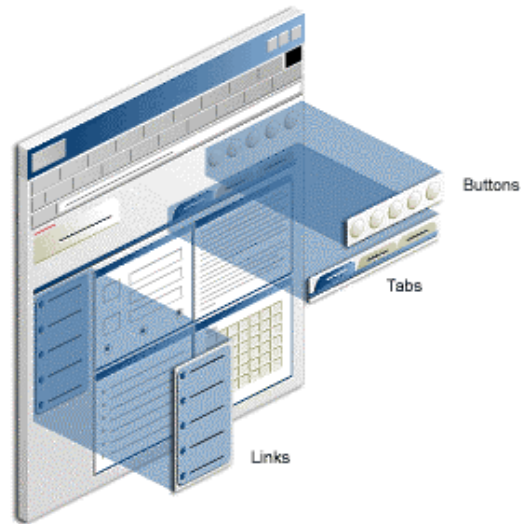
[\[Viewlet\] Show me how to create a style!](#)

Updating Page Styles



You can further customize your pages by adding images to reinforce company branding or enhance the appearance of the page. For example, use images in place of default banner text, in a page background, or in a consistent location on a page.

Navigation



To assist users with locating relevant information in your portal, you have many options for adding navigation. For example, you could set up drop-down lists of your site categories and perspectives. Users click an item on the list and jump to a page that is dynamically populated with all content classified under the selected category or perspective.

You could create a page, populate it with links to relevant pages, publish the page as a portlet, and reuse it throughout your portal. You could include path information (i.e., breadcrumbs) at the bottom of each new page, enabling users to move up and down a page group hierarchy with ease.

These are just a few of the ways you can use navigation in your portal.

[\[Viewlet\] Show me a way to add navigation to my portal!](#)

OracleAS Portal contains a well-stocked chest of tools for streamlining and simplifying the process of creating well-constructed, stylish pages for your company's Web content.

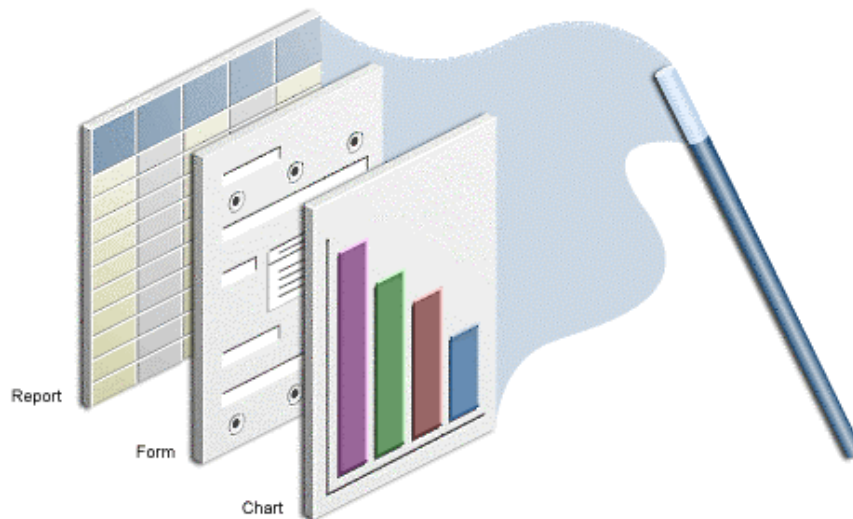
Building Components on top of Various Data Sources

Introduction



In OracleAS Portal, developers at all levels of sophistication will find a complete set of productive tools for creating static, dynamic, and transactional components and exposing them as portlets in your enterprise portal.

Declarative Development

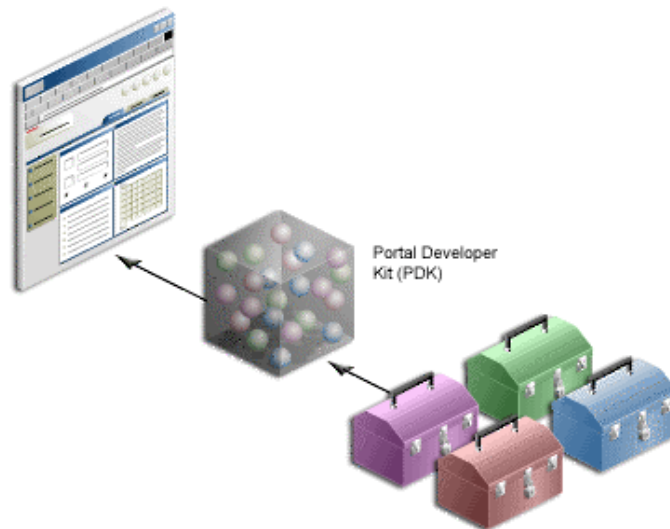


If you prefer a declarative environment, OracleAS Portal's wizards step you through the creation of reports, forms, charts, and other types of dynamic components with tools so easy to use that even novice developers can turn out reports the first time they use them!

The wizards do not limit you to a fixed development path, you also have the option of extending your component by adding PL/SQL that runs at different points during the execution of the form, report, or chart.

[\[Viewlet\] Show me how to build a simple report portlet declaratively!](#)

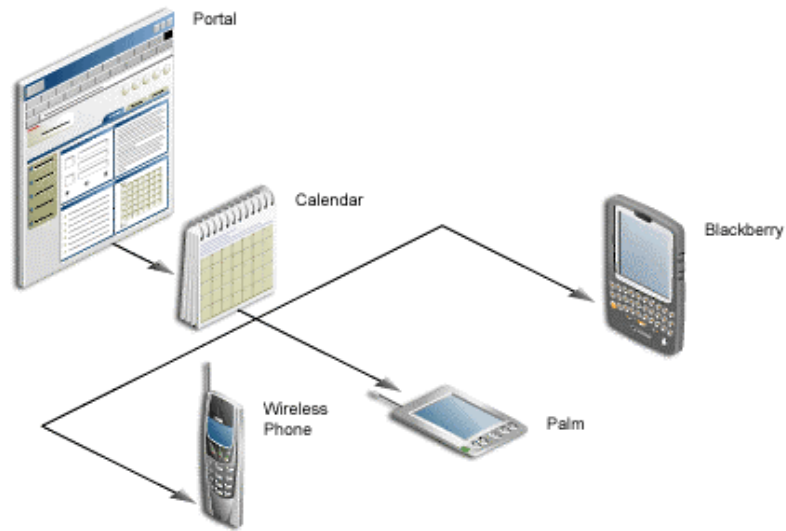
Hand-Coding



If you prefer to code your components by hand, OracleAS Portal provides the Portal Developer Kit (PDK). Use the application programming interfaces in PDK to build Web content and applications and integrate them with OracleAS Portal.

The PDK is for you if you prefer to have total control over development. Use it to hand-code your own portlets using JSPs, Java Servlets, and PL/SQL.

Going Mobile



With OracleAS Portal's mobile capability, it's easy to adjust a portal component for display on a mobile device. For example, create a report then select the essential report columns for display on mobile devices. This lets you pare data down for display on a very small screen.

OmniPortlet and Web Clipping



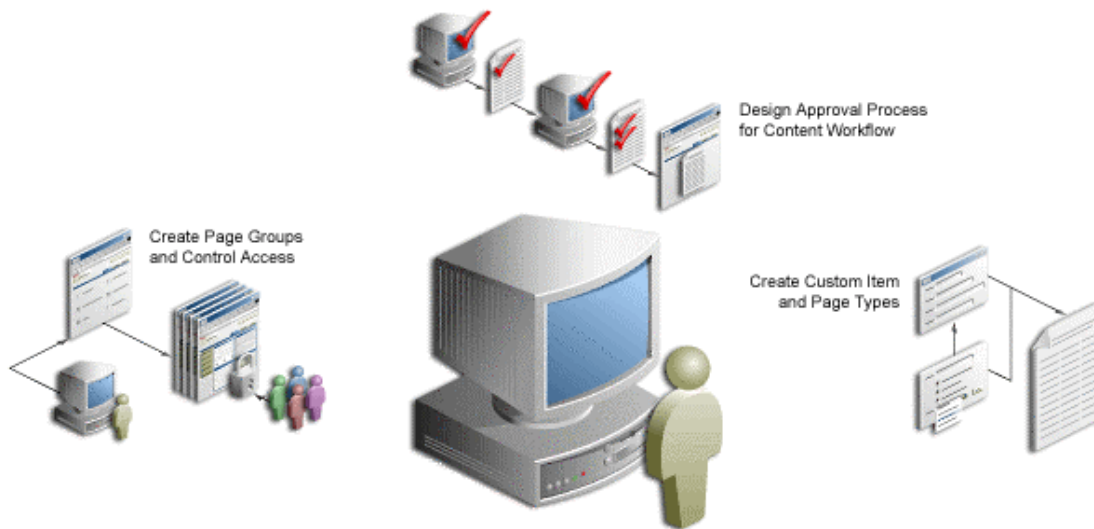
Using the OmniPortlet and Web Clipping portlets, you can easily publish data from various types of data sources, such as spreadsheets, XML, Web Services, SQL, and even content from existing Web pages. For example, you can choose an existing Web page as a data source, then launch the Web Clipping Studio to clip the exact data on the selected page that you want to display in a portlet. You can customize this data for your users with

OmniPortlet's filtering capabilities at both the database and portlet level, as well as utilize portlet and page parameters. Both the OmniPortlet and Web Clipping portlets include an easy-to-use graphical interface that enables you to create great-looking portlets that integrate seamlessly with your portals.

For more information on using the OmniPortlet and Web Clipping portlets, refer to the "OmniPortlet and Web Clipping" section on Portal Center, <http://portalcenter.oracle.com>.

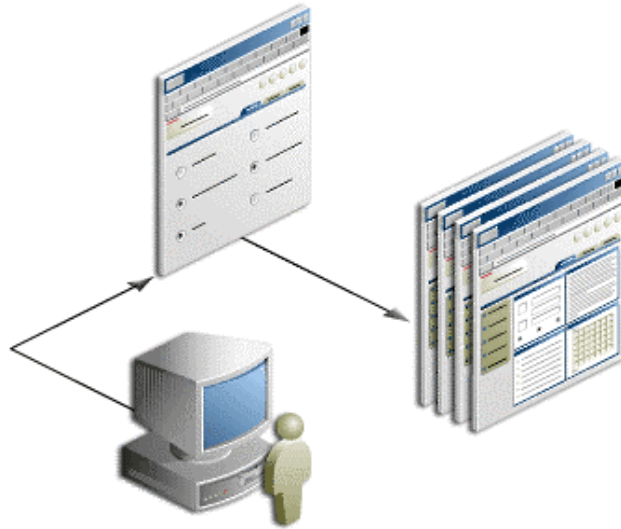
Administering Pages Dedicated to a Particular Use

Introduction



To keep your company's internal and external Web sites well organized and secure, OracleAS Portal provides a sophisticated but simple means of securing and delegating ownership of the page groups that comprise your company's presence on the Web.

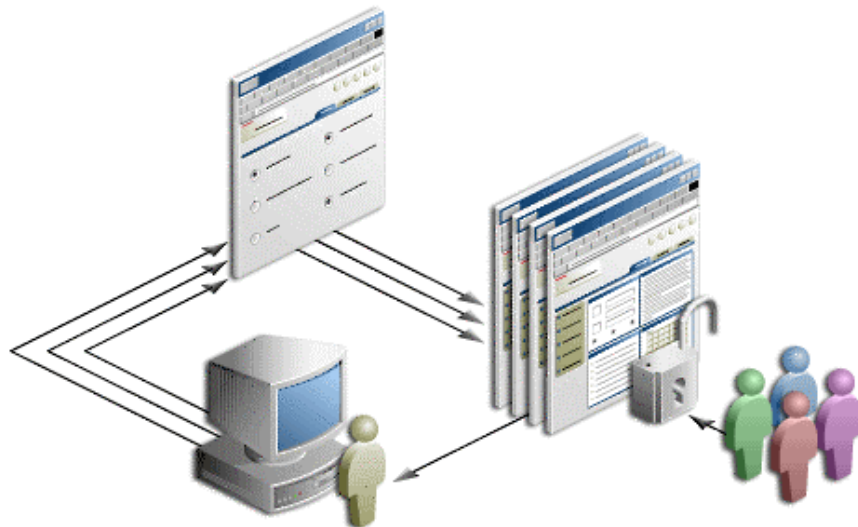
Setting Up a Page Group



Setting up a new page group is as easy as clicking a link and specifying some basic page group properties. These include naming the group, specifying the default language for member pages, and selecting a template on which new pages in the group can be based.

[\[Viewlet\] Show me how to create a page group!](#)

Editing a Page Group

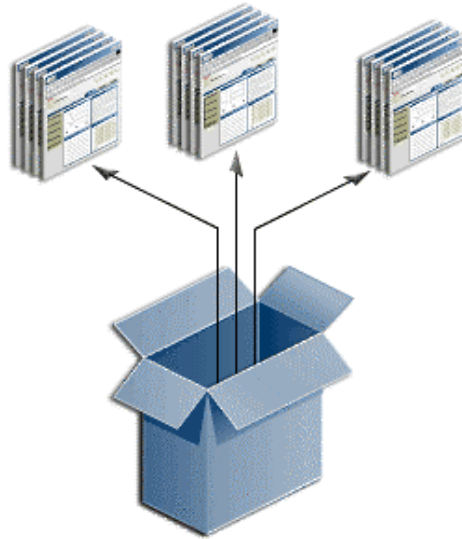


Once you create a page group, you can edit its properties to exercise a greater level of control over how the pages in the group will behave and who will have what kind of access to them. Use page group properties to configure the page group, specify rules

governing item versioning and deletion, define rules governing translation, and set user and group access privileges to pages in the group.

[\[Viewlet\] Show me how to edit page group properties!](#)

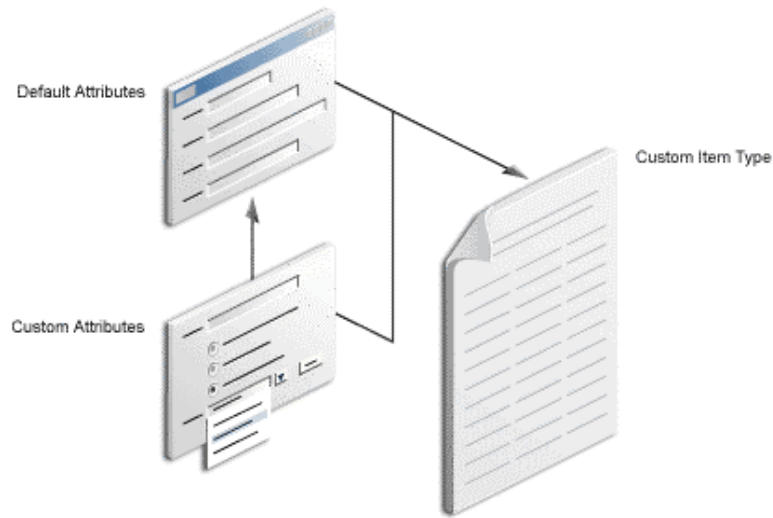
Out-of-the-Box Page Groups



OracleAS Portal creates some default page groups during installation. You can start using these right away. They include:

- **Corporate Pages** for your corporate home pages
- **Portal Design-Time Pages** for access to OracleAS Portal's design-time tools
- **Portlet Repository** for access to all the portlet providers and associated portlets available in your installation
- **Shared Objects** for the creation and storage of reusable objects that can be shared across page groups

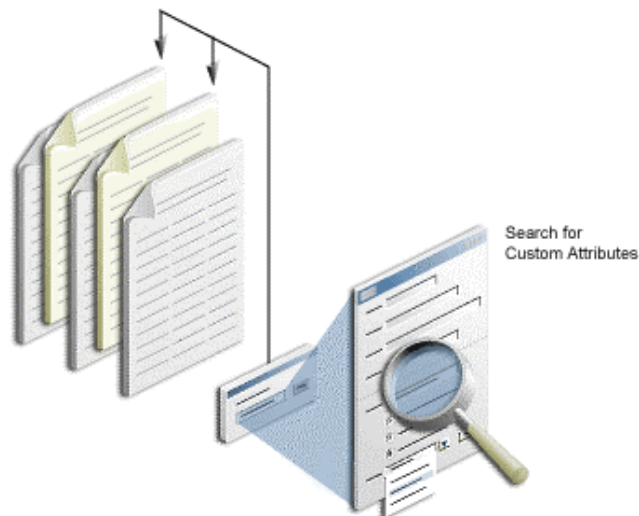
Item Types and Attributes



OracleAS Portal provides an assortment of base attributes, item types, and page types that you can use in developing your portal. Each item and page type includes attributes for storing information about the item or page. For example, attributes can capture such things as an item's internal name, its display name, and its description.

As you plan your portal content, and define and implement the content metadata, you may discover that your content requires additional attributes that are not part of the standard attribute set. To meet your requirements, you can create new item types with a custom set of attributes, or you can extend the default item types by adding attributes, removing attributes, or changing an attribute's properties.

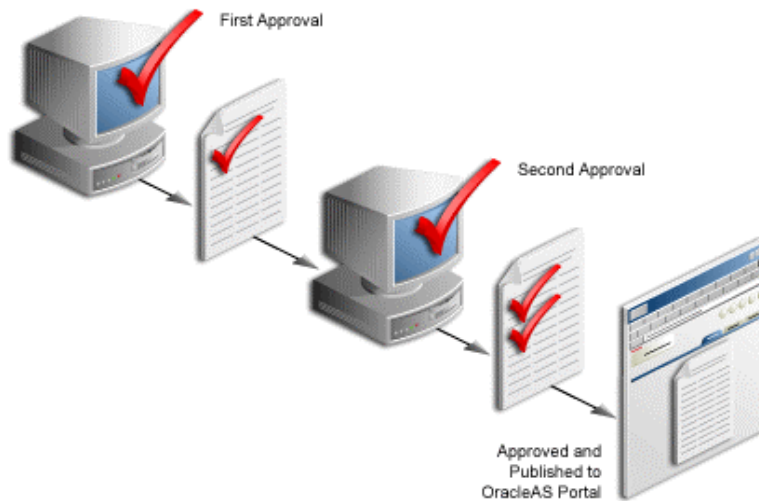
Custom Item Types and Searches



Once configured, custom item types enable you to capture information about the content as it is being published or edited. In this way, you can ensure that content is relevant to your business and easier to locate. For example, you can use Advanced Search to search for a particular type of item attribute. You can use Custom Search to automatically populate a page with all portal content that shares a common attribute with a specific value.

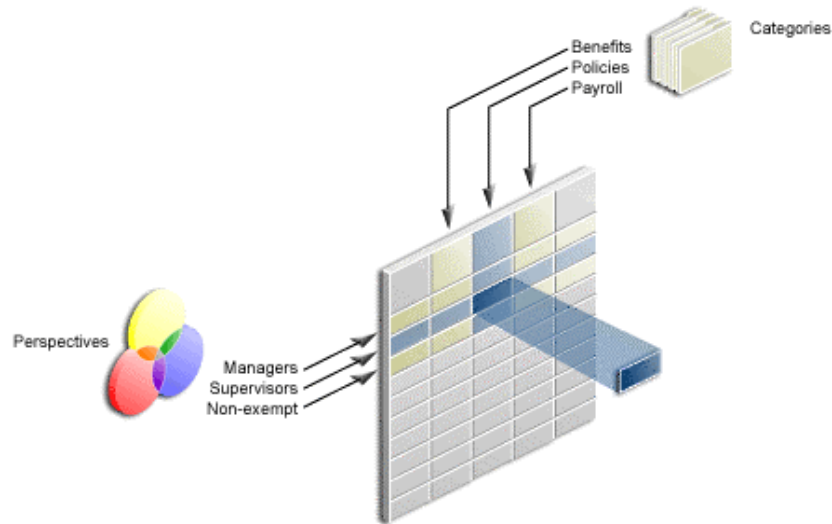
[\[Viewlet\] Show me how to create a custom item type!](#)

Creating an Approval Process



With OracleAS Portal you can design an approval process that automatically ushers content under review through its string of reviewers. The item can move to one or more approvers, simultaneously or in parallel. It is published only when your approval chain is complete. This can be particularly useful for document reviews!

Categories and Perspectives

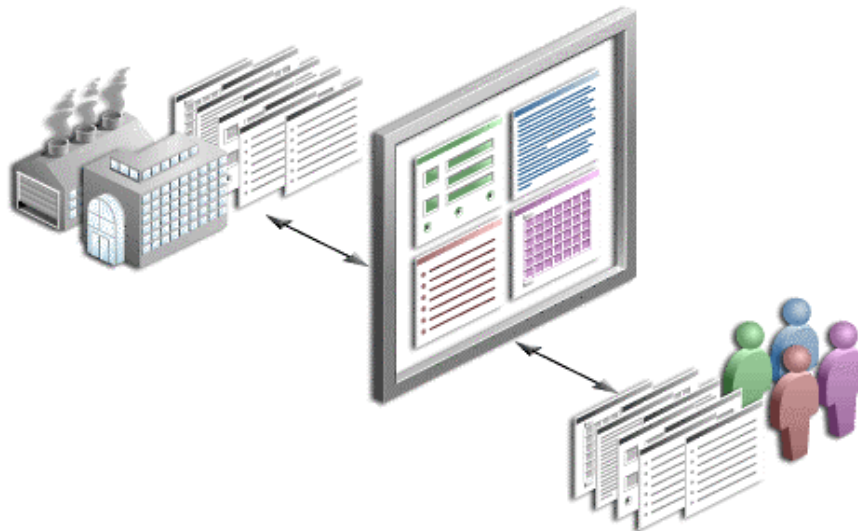


You can pre-design default content classifications by setting up categories and perspectives. Your users can take advantage of these to classify the content they add to pages and to simplify the search for content of interest.

[\[Viewlet\] Show me how to create categories and perspectives!](#)

Administering OracleAS Portal

Introduction

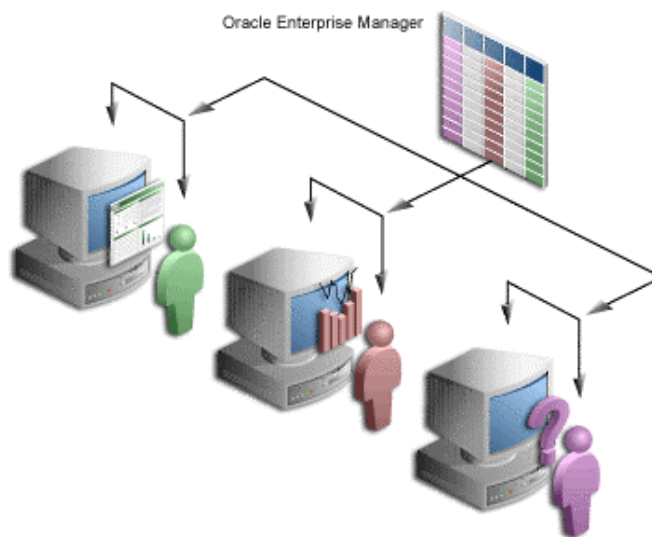


When we say OracleAS Portal is complete, we mean it provides an application framework that supports every level of involvement with a business portal, from content

viewers, content publishers, and application developers, all the way up to those administering the portal.

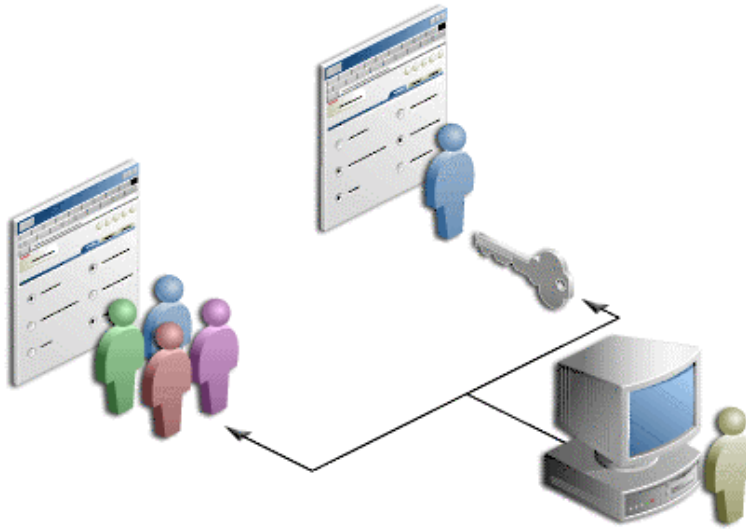
Because OracleAS Portal is part of Oracle Application Server, administrators also have access to OracleAS services, such as monitoring and configuration tools, single sign-on, directory integration, caching, and security. All features required for managing users and groups, for setting up security and search features, and for administering the portal and database are incorporated into a series of dialog boxes accessed through portlets on a portal page.

Oracle Enterprise Manager



For monitoring and configuration services, OracleAS Portal integrates seamlessly with Oracle Enterprise Manager (EM), included with Oracle Application Server. With EM, you can configure Database Access Descriptors (DADs) to specify how mod_plsql connects to a database to fulfill an HTTP request; configure mod_plsql cache settings; and monitor the components that OracleAS Portal depends on, such as the Oracle HTTP Server, mod_plsql, the Parallel Page Engine, the Oracle Database, the Single Sign-On Server, the Syndication Server, Ultra Search, and your various providers. Additionally, EM offers a user interface to maintain other relevant mid-tier configuration files.

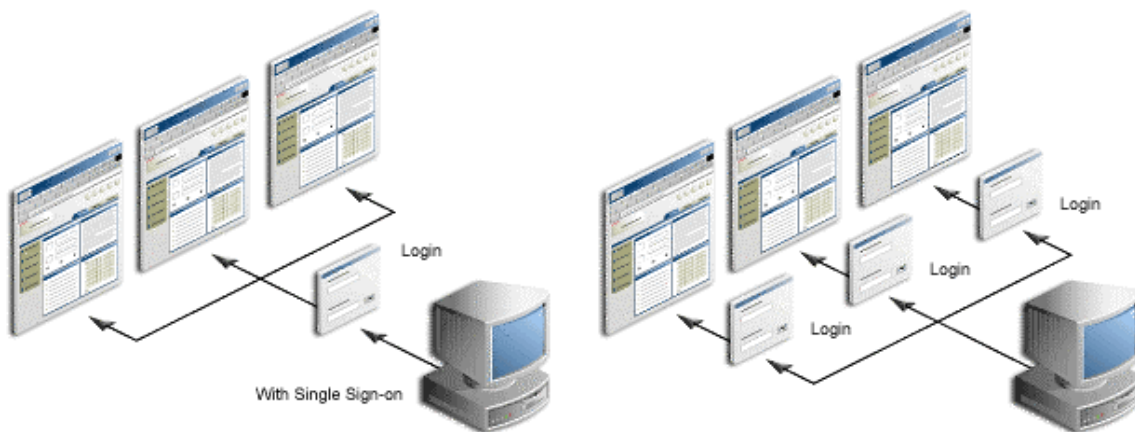
Defining User Access Rules



For administering users, OracleAS Portal provides managers that enable you to create and manage user accounts, profiles, and groups. OracleAS Portal also provides pre-defined sets of privileges for easy set-up of user and group access to different types of portal objects. Privilege sets are tailored to different object types. For example, page groups come with one set of access privileges, while pages come with another.

Authentication is managed through the OracleAS Single Sign-On Server (SSO).

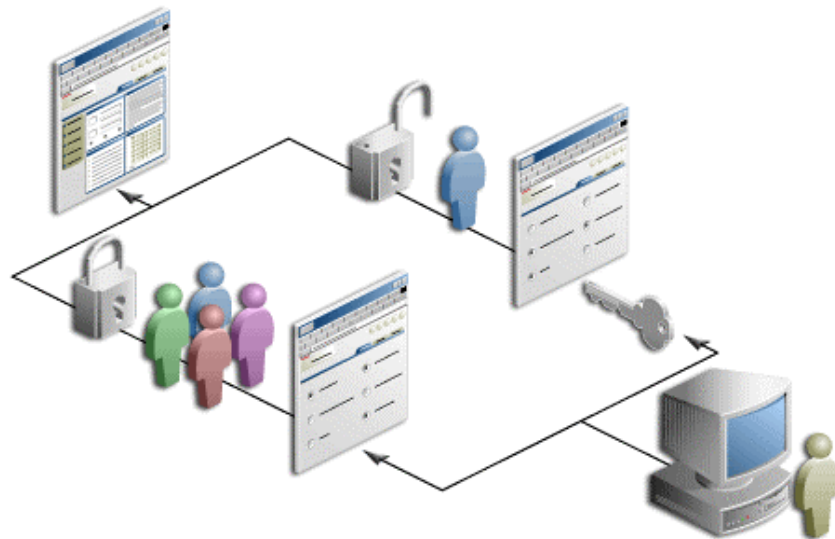
Single Sign-On



The main advantage of SSO is that it reduces or eliminates the necessity for users to enter multiple logins as they access multiple applications and multiple data sources through a portal. Credentials are stored in the Oracle Internet Directory (OID).

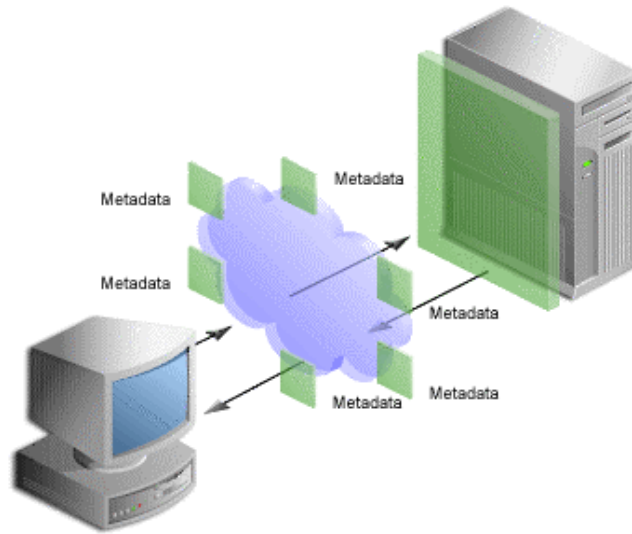
To create a new user, you access the user manager in the Delegated Administration Service (DAS) of OID through OracleAS Portal's User portlet. A small amount of information about the user is required to create a user account: a username, an e-mail address, and a password. Account information is stored in OID. You can also import account information from any LDAP directory into OID.

Roles and Privileges



By assigning privileges to various groups, you establish roles that control which group has access to what OracleAS Portal functionality. A number of groups are created by default. Administrators can enroll users in these groups right out of the box. Unauthenticated users can access all objects that are granted to the PUBLIC user. Likewise, logged-on users have access to the objects granted to the AUTHENTICATED_USERS group. You can grant additional portal-level privileges to specific users and groups to perform specific functions.

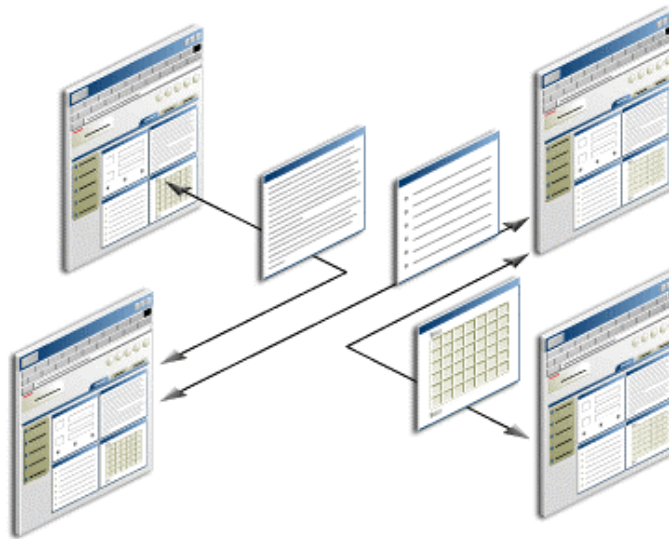
OracleAS Web Cache



To enhance performance and scalability, OracleAS Portal makes use of Oracle Application Server Web Cache. This provides two key performance advantages:

- Metadata and content are cached in memory, providing a significant performance enhancement over file-based caching.
- Different types of caching are available, including expiry-based, validation-based, and invalidation-based caching.

Export/Import



OracleAS Portal's export/import feature supports the migration of portals and content between development and production environments. Use the Portal Navigator to export page groups or database providers. When you export page groups, all objects within the page group as well as referenced and shared objects are exported. These include pages, categories, perspectives, styles, custom types, Web providers, and Access Control Lists (ACLs) associated with the page group.

OracleAS Portal centralizes access to all the tools you need to administer your company's portal. Through Portal, you can administer users, access the Oracle Internet Directory for setting up single sign-on, monitor your portal environment, an export/import portal objects from one installation to another (of the same version).